Proceedings of the

Montana Distance Learning Task Force

Phase I

Established by the Montana Board of Public Education
in
September 2006

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Montana Office of Public Instruction

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Montana Board of Public Education
Distance Learning Task Force Final Report
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Montana Board of Public Education Distance Learning Task Force

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Executive Summary

Phase I

December 2006 – January 2007

Montana Board of Public Education
Distance Learning Task Force
Executive Summary – Phase I
December 2006 – January 2007

In September 2006, the Montana Board of Public Education (BPE) established the Distance Learning Task Force to address issues of currency, flexibility, quality and accountability pertaining to its rule governing distance, online, and technology delivered programs and/or courses serving Montana public school students. The BPE further established the purpose, guiding principles and charge of the Distance Learning Task Force.

Purpose - To review and revise Administrative Rules of Montana (ARM) 10.55.907 Distance, Online, and Technology Delivered Learning as needed to align the standard with current best practices.

Guiding Principle - Distance education serves the student learning needs of the present and future providing flexibility and ensuring quality.

Charge - The Distance Learning Task Force shall provide to the Board of Public Education recommendations for amendments to ARM 10.55.907 Distance, Online, and Technology Delivered Learning. Recommended amendments to the ARM will comply with MAPA rules for public hearing.

Dr. Kirk Miller, Chairperson of the BPE Distance Learning Committee, and Bud Williams, Deputy Superintendent of the Office of Public Instruction (OPI), serve as co-chairs of the task force. Dr. Janet Thomas serves as the Records Facilitator of the task force work.

The BPE further established the work of the task force be divided into at least two phases. Phase I would result in recommendations to the BPE at its January, 2007 meeting; Phase II of the Distance Learning Task Force would begin following the 2007 Legislative Session.

PHASE I

The Distance Learning Task Force met on three occasions, December 4, 2006; December 15, 2006; and January 6, 2007. In addition, a sub-committee of the task force met on December 20, 2006 and January 2, 2007, to provide specific recommendations for the task force final phase I work session. Members of the

Distance Learning Task Force are listed in Appendix _ and Sub-Committee members are listed on page _.

Each meeting was purposely broadcast across Montana; all of the Task Force discussions, deliberations and proceedings were live, enabling potential audiences to see and hear the Task Force in real time. The meetings were also recorded so that a complete record was kept; tapes were made available on request. Task Force members who were unable to attend the meetings in Helena due to bad weather, and requested a local link, were able to participate directly at their local access point.

December 4, 2006

Distance Task Force Members convened to begin their work under the direction of Dr. Kirk Miller and Bud Williams. Ground rules were established, and the purpose, charge and guiding principles were noted and accepted by the group.

ARM 10.55.907— Distance, Online, and Technology Delivered Learning was reviewed. Dr. Janet Thomson delivered a one-hour Power Point presentation, briefing members on the "State of Distance Learning". The presentation included the status of distance learning in other states, nations, and private initiatives. Each member received copies of all of the research reports reviewed. Following the presentation members responded to a question in order to elicit their concerns: "When I think about distance learning, I'm most concerned about…?" [Answers to this question were used to focus the agenda for the second meeting]

Task Force members joined small groups of their choosing in order to briefly review research materials together, and to formulate possible discussion points and issues of interest. Groups reported out their concerns at the end of the day. The group collectively set the agenda for the second meeting on December 15, 2006.

December 15, 2006

Task Force members who had been unable to attend the first meeting were briefed in a one-hour session by Dr. Miller, Bud Williams, and Dr. Thomson.

The purpose, charge and guiding principles were again quickly reviewed, and Task Force members received a synopsis of the concerns generated in the December 4 Task Force meeting. Dr. Thomson reviewed these, asking participants to (for themselves) identify their biggest concerns, holding these for later possible discussion.

The OPI Staff summarized K-12 data collected concerning Distance Learning and Advanced Placement in Montana. Registered providers of Distance Learning

in Montana gave presentations or provided written summaries of their programming, as a means to give the Task Force an idea of who presently provides Distance Learning in Montana schools. Policies and practices from other states were noted in an update presentation. The BPE staff discussed rule making authority and the OPI staff reviewed the fiscal impact, as well as further background on ARM 10.55.907, as requested by individual questions. Each Task Force member was given the opportunity to respond to further concerns about Distance Learning.

The Task Force agreed to meet on January 6, 2007 to consider draft proposals for new language. All members were given the opportunity to participate in Sub-Committee meetings convened in late December for the purpose of drafting possible amendments to ARM 10.55.907. [Sub-Committee members met with Dr. Linda V. Peterson to draft amendments.]

January 6, 2007

The Task Force considered 14 proposed changes to ARM 10.55.907. Changes to definitions [ARM 10.55.602] were considered first, as these impacted all other proposed changes. The Task Force approved the additions to definitions (Proposals 10-14) by consensus, with one member abstaining.

The Task Force reached consensus [one member abstaining] on an addition to ARM 10.55.701 (Proposal 9, as amended) concerning local control—a requirement that local Boards of Trustees have a written policy addressing distance, online, and technology delivered learning.

Proposal 1- approved by consensus ;(1 abstention)
Proposal 2 - amended and approved by consensus (1 abstention);
Proposal 3 - amended and approved by consensus (3 voting no, 1 abstention)—minority report rationale provided;
Proposal 4-8 - Task Force members voted to discuss the proposals together. Proposals 4,5,6,8 were approved by consensus, with 3 members voting no, and 1 member abstaining. Proposal 7 passed 10 - 8 with 1 abstention. Minority issues were articulated by Task Force members and are included in the full report.

The Task Force identified other Distance Learning issues [Appendix E] which will be addressed in other meetings in spring and summer 2007.

Montana Board of Public Education Distance Learning Task Force

Sub-Committee Report

Montana Board of Public Education
Distance Learning Task Force

Sub-Committee Report
January 2, 2007

Members of the Distance Learning Sub-Committee included Eric Feaver, MEA-MFT; Michael Hall, Office of Public Education (OPI); Lance Melton, Montana Association School Board Association (MTSBA); Steve Meloy, Board of Public Education (BPE); Claudette Morton, Montana Small Schools Alliance (MSSA); Linda Vrooman Peterson, Office of Public Instruction (OPI); Dave Puyear, Montana Rural Education Association (MREA); Darrell Rud, School Administrators of Montana (SAM); and Bob Vogel, Montana School Boards Association (MTSBA).

The Distance Learning Sub-Committee met December 20, 2006, and January 2, 2007, to discuss amendment options of ARM 10.55.907 Distance, Online, and Technology Delivered Learning. The Distance Learning Task Force requested the sub-committee focus on the following areas: supplement, not supplant; licensure, facilitator qualifications, role, and training; provider registration; local control; and definitions of basic terms

During its work sessions, the sub-committee addressed two other Administrative Rules of Montana, ARM 10.55.602 Definitions and ARM 10.55.701 Board of Trustees, which are impacted by the proposed amendments of ARM 10.55.907 Distance, Online, and Technology Delivered Learning.

The Sub-Committee recommends that the Distance Learning Task Force consider the following proposals for amendment of ARM 10.55.907, ARM 10.55.701, and ARM 10.55.602.

Sub-Committee Proposal 1
ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED LEARNING (2) (b) Distance, online, and technology delivered learning programs and/or courses shall meet the learner expectations adopted by the school district ~~or~~ and be aligned with state content and performance standards.

> **Sub-Committee Rationale**
> Administrative Rules of Montana require school districts to develop written curriculum and assessment aligned to state content and performance standards. It is important to add "…and be aligned with state content and performance standards…" to ensure that distance learning, online, and technology delivered learning programs and/or courses are also aligned to the state standards.

Montana Board of Public Education
Distance Learning Task Force

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January 2, 2007

Sub-Committee Proposal 2
ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED
LEARNING
　(2)　School districts may receive and/or provide distance, online, and technology delivered learning programs.
　(2)(c)　If a student takes a majority of courses work by during a grading period via distance, online, and technology delivered programs, the school shall provide a report to the Office of Public Instruction documenting how it is meeting the student's needs under the accreditation standards.

Sub-Committee Rationale
Schools are more than a collection of courses to be completed successfully, if a school wishes to have students take distance, online, and/or technology delivered courses at any given time, the school must provide a report to the Office of Public Instruction explaining how it is meeting the students needs in 10.55.801 Education Opportunity, 10.55.802 Learner Access, 10.55.1001 District's Responsibility for Program Area Standards, 10.55.1003 Program Foundation Standards and whichever Program Delivery Standards are being offered to the student.

Sub-Committee Proposal 3
ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED
LEARNING
　(3)　Except as provided in (3)(a), Tteachers of distance, online, and technology delivered learning programs shall be licensed and endorsed in Montana in the area of instruction taught with such license granted as a result of the completion of a professional educator preparation program accredited by NCATE and/or a state board of education. School districts receiving distance, online, and technology delivered learning programs described in this rule shall have a distance learning facilitator as provided in this rule assigned for each course and available to the students.
Sub-Committee Rationale
Teachers providing instruction to Montana students whether in a traditional classroom or via distance, online, and technology delivered learning must be licensed and endorsed in the area of instruction. Pursuant to MCA 20-4-104 all teachers in teaching in public schools shall be licensed and endorsed. In addition, all Montana public schools are required to employ teachers who are licensed and endorsed in the area of instruction to meet Montana's federally approved definition of a highly qualified teacher under the No Child Left Behind Act of 2001 (NCLB).

**Montana Board of Public Education
Distance Learning Task Force**

**Sub-Committee Report
January 2, 2007**

Sub-Committee Proposal 4
ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED
LEARNING
(3)(a)   When a teacher of distance, online, and technology delivered learning programs and/or courses ~~is not licensed and endorsed as provided in this rule~~, does not possess the qualifications specified in (3) above, the facilitator must ~~hold a Montana educator license~~ be licensed and endorsed in Montana in the area of instruction facilitated. ~~taught~~

Sub-Committee Rationale
Ensuring quality education for all Montana students requires the establishment of an environment conducive to learning. If the instructor of a course or program via distance, online, and technology delivered learning is not licensed and endorsed in the area of instruction, the facilitator must be in order to establish the appropriate learning environment for

Instruction of a course is more than knowledge of the content. It is imperative that the facilitator be a teacher of the content to ensure that the learning environment and support instructional methods are appropriate to the learning situation.

Sub-Committee Proposal 5
ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED
LEARNING
(3)(b)   When a teacher of distance, online, and technology delivered learning programs is ~~licensed and endorsed in the area of instruction,~~ qualified as provided in ~~this rule~~ (3) above, the receiving school district's facilitator shall be a licensed teacher or a para-educator.

Sub-Committee Rationale
The teacher providing the content, instruction and communication is licensed and endorsed in the content area; therefore, the receiving learning setting requires a licensed teacher or qualified para-educator to maintain the general learning environment.

Montana Board of Public Education
Distance Learning Task Force

Sub-Committee Report
January 2, 2007

Sub-Committee Proposal 6
ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED LEARNING
        (3)(c) School districts receiving distance, online, and technology delivered learning programs and/or courses must provide qualified facilitators for synchronous delivery, requiring physical presence of a facilitator, and for asynchronous delivery, requiring facilitators be available to students.

        Sub-Committee Rationale
        Because the delivery of distance, online, and technology programs and/or courses varies, facilitators are necessary in all situations.

Sub-Committee Proposal 7
ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED LEARNING
        (5) All providers and coordinating entities of distance, online, and technology delivered learning programs, other than Montana school districts, shall annually, no later than October 1:

        Sub-Committee Rationale
        Data are required to ensure quality of instruction and program.

Sub-Committee Proposal 8
ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED LEARNING
        (5)(c) ~~verify~~ document the professional qualifications, including Montana teacher licensure and endorsement if possessed, of their teachers of distance, online, and technology delivered programs and/or courses;

        Sub-Committee Rationale
        Documentation of qualifications is required in the accreditation and licensure processes.

Sub-Committee Proposal 9
ARM 10.55.701 BOARD OF TRUSTEES
        (3)(p) a policy addressing distance, online, and technology delivered learning

        Sub-Committee Rationale
        Continues Montana's value of local control.

Montana Board of Public Education
Distance Learning Task Force

Sub-Committee Report
January 2, 2007

Sub-Committee Proposal 10
ARM 10.55.602 DEFINITIONS
2) "Asynchronous" means not occurring at the same time. "Asynchronous" refers to content, instruction and communication between participants (e.g., students and teachers) that occurs at different times, the period of which may vary by circumstance. (e.g., e-mail, threaded discussions, homework, message boards).*See also synchronous.*

Sub-Committee Rationale
A basic term referred in ARM 10.55.907.

Sub-Committee Proposal 11
ARM 10.55.602 DEFINITIONS
(8) " Distance learning" means instruction in which students and teachers are separated by time and/or location with synchronous or asynchronous content, instruction and communication between student and teacher. (e.g., correspondence courses, online learning, videoconferencing, streaming video).

Sub-Committee Rationale
A basic term referred in ARM 10.55.907.

Sub-Committee Proposal 12
ARM 10.55.602 DEFINITIONS
(15) "Online learning" means education activity in which instruction and content are delivered primarily via the Internet. Online learning is a form of distance learning.

Sub-Committee Rationale
A basic term referred in ARM 10.55.907.

Sub-Committee Proposal 13
ARM 10.55.602 DEFINITIONS
(17) "Synchronous" means occurring at the same time. "Synchronous" refers to content, instruction and communication between participants (e.g., students and teachers) that occurs at the same time even though they may be in different physical locations. For example, instruction in which students and teachers are online at the same time so that a question can be immediately answered. (e.g., telephone calls, face-to-face meetings, physical classrooms, chat rooms, and videoconferencing). *See also asynchronous.*

Montana Board of Public Education
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Sub-Committee Report
January 2, 2007

Sub-Committee Rationale
A basic term referred in ARM 10.55.907.

Sub-Committee Proposal 14
ARM 10.55.602 DEFINITIONS
 (18) "Technology delivered learning" means instruction and content delivered via digital technologies (e.g., online, CD-ROM, DVD-ROM or learning experiences that involve primarily the use of computers).

Sub-Committee Rationale
A basic term referred in ARM 10.55.907.

Montana Board of Public Education Distance Learning Task Force

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January 6, 2007

Recommendations

Montana Board of Public Education
Distance Learning Task Force

Task Force Consideration of Proposals 10-14
January 6, 2007

When the Task Force met to consider the 14 Sub-Committee Proposals, five of the proposals concerned new definitions; these were handled first by the Task Force, because the definitions were necessary to the new language being added to Administrative Rules of Montana 10.55.907. Chairman Kirk Miller introduced Linda Vrooman Peterson, who gave the Sub-Committee rationale concerning the necessity of these terms: these five terms are considered basic to ARM 10.55.907. At the conclusion of the rationale, a Task Force member called for the question, asking that all 5 definitions be considered in one motion; there was a second. A brief discussion ensued; in a vote, all task force members voted to consider Proposals 10-14 together. When the question was called re: Proposals 10-14, there was consensus; all five definitions were accepted: 18 yes votes, 1 abstention (Darrell Rud, Executive Director of School Administrators of Montana, abstained from all votes, due to a possible conflict of interest. Mr. Rud was appointed by the National Association of Elementary School Principals to serve as its representative on the Specialty Areas Studies Board (SASB) of the National Council for the Accreditation of Teacher Education (NCATE).

Sub-Committee Proposals 10-14
The Distance Learning Task Force recommends the following definitions for addition to **ARM 10.55.602**:

2) "Asynchronous" means not occurring at the same time. "Asynchronous" refers to content, instruction and communication between participants (e.g., students and teachers) that occurs at different times, the period of which may vary by circumstance. (e.g., e-mail, threaded discussions, homework, message boards).*See also synchronous.*

(8) " Distance learning" means instruction in which students and teachers are separated by time and/or location with synchronous or asynchronous content, instruction and communication between student and teacher. (e.g., correspondence courses, online learning, videoconferencing, streaming video).

15) "Online learning" means education activity in which instruction and content are delivered primarily via the Internet. Online learning is a form of distance learning.

(17) "Synchronous" means occurring at the same time. "Synchronous" refers to content, instruction and communication between participants (e.g., students and teachers) that occurs at the same time even though they may be in different physical locations. For example, instruction in which students and teachers are

online at the same time so that a question can be immediately answered. (e.g., telephone calls, face-to-face meetings, physical classrooms, chat rooms, and videoconferencing). *See also asynchronous.*

(18) "Technology delivered learning" means instruction and content delivered via digital technologies (e.g., online, CD-ROM, DVD-ROM or learning experiences that involve primarily the use of computers).

Sub-Committee Rationale
Basic terms referred in ARM 10.55.907.

Proposals 10-14 approved by the Task Force on January 6, 2007.

**Montana Board of Public Education
Distance Learning Task Force**

**Task Force Consideration of Proposal 9
January 6, 2007**

The Task Force considered an addition to ARM 10.55.701 (Proposal 9). Chairman Kirk Miller introduced Linda Vrooman Peterson, who gave the Sub-Committee rationale for the requirement that local Boards of Trustees have a written policy which addresses distance, online, and technology delivered learning. The Sub-Committee stated that this policy would continue Montana's value of local control.

At the conclusion of the rationale, a Task Force member called for the question. There was consensus: 18 yes votes, 1 abstention (1 Task Force member had to abstain on all votes, due to a possible conflict of interest—he is a member of an NCATE Board).

The Distance Learning Task Force proposes the following definitions for addition to **ARM 10.55.701**:

Sub-Committee Proposal 9
ARM 10.55.701 BOARD OF TRUSTEES

(3)(p) a policy addressing distance, online, and technology delivered learning.

Sub-Committee Rationale
Continues Montana's value of local control

**Proposal 9 approved as amended by the Task Force on
January 6, 2007**

ARM 10.55.701 BOARD OF TRUSTEES
(3)(p) a policy addressing distance, online, and technology delivered learning as those terms are defined in ARM 10.55.602.

**Montana Board of Public Education
Distance Learning Task Force**

**Task Force Consideration of Proposals 1 and 2
January 6, 2007**

Sub-Committee Proposal 1
ARM 10.55.907 DISTANCE , ONLINE, AND TECHNOLOGY DELIVERED LEARNING (2)(b) … and be aligned with state content and performance standards…

The Task Force considered an addition to Administrative Rules of Montana (ARM) ARM 10.55.907 (2)(b). Chairman Kirk Miller introduced Linda Vrooman Peterson, who gave the Sub-Committee rationale.

> **Sub-Committee Rationale**
> Administrative Rules of Montana require that school districts develop written curriculum and assessment aligned to state content and performance standards. It is important to add "…and be aligned with state content and performance standards…" to ensure that distance learning, online, and technology delivered learning programs and/or courses are also aligned to the state standards.

Discussion followed and the amendment was approved by the Task Force.

Sub-Committee Proposal 2
The Task Force considered an addition to ARM 10.55.907 (2)(c) If a student takes a majority of courses during a grading period via distance, online, and technology delivered programs the school shall provide a report to the Office of Public Instruction documenting how it is meeting the student's needs under the accreditation standards.

Chairman Kirk Miller introduced Linda Vrooman Peterson, who gave the Sub-Committee rationale.

> **Sub-Committee Rationale**
> Schools are more than a collection of courses to be completed successfully, if a school wishes to have students take distance, online, and/or technology delivered courses at any given time, the school must provide a report to the Office of Public Instruction explaining how it is meeting the students needs in ARM 10.55.801 Education al Opportunity, ARM 10.55.802 Learner Access, ARM 10.55.1001 District's Responsibilities for Program Area Standards, ARM 10.55.1003 Program Foundation Standards and whichever Program Delivery Standards are being offered to the student.

Mr. Melton proposed a substitute motion for ARM 10.55.907 (2)(c). Discussion ensued. The question was called. The substitute motion to amend ARM 10.55.907 (2)(c), was made and seconded. After considerable discussion, the substitute motion passed, 18 yes, /1 abstention.

Proposals 1 and 2 were approved as amended by the Task Force on January 6, 2007

ARM 10.55.907 (2)(b) Distance, online, and technology delivered learning programs and/or courses shall meet the learner expectations adopted by the school district ~~or~~ <u>and be</u> aligned with state content and performance standards.

ARM 10.55.907 (2)(c) *<u>A school district shall provide a report to the OPI documenting how it is meeting the needs of students under the accreditation standards who are taking a majority of courses during each grading period via distance, online, and/or technology-delivered programs.</u>*

Montana Board of Public Education
Distance Learning Task Force

Task Force Consideration of Proposal 3
January 6, 2007

Sub-Committee Proposal 3
    Sub-committee Rationale
    Teachers providing instruction to Montana students in public schools whether in a traditional classroom or via distance, online, and technology delivered learning must be licensed and endorsed in the area of instruction. Pursuant to MCA 20-4-104 Teacher Certification all teachers in teaching in public schools are required to be licensed and endorsed. In addition, all Montana public schools are required to employ teachers who are licensed and endorsed in the area of instruction to meet Montana's federally approved definition of a highly qualified teacher under the No Child Left Behind Act.

    The question was called. It was moved and seconded to accept the proposal language. During the considerable discussion that followed the proposal was amended to reinsert the words "Except as provided in (3) (a)". When the amended proposal was voted on, the vote was 3 no (Claudette Morton, Brian Patrick, Bruce Whitehead), 1 abstention (Darrell Rud), and 15 yes. The amended proposal advanced.

Proposal 3 was approved as amended by the Task Force on January 6, 2007

ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED LEARNING
    (3) Except as provided in (3)(a), ~~teachers~~ of distance, online, and technology delivered learning programs shall be licensed and endorsed in Montana in the area of instruction taught ~~with such license granted as a result of the completion of a professional educator preparation program accredited by NCATE and/or a state board of education~~. School districts receiving distance, online, and technology delivered learning programs described in this rule shall have a distance learning facilitator ~~as provided in this rule assigned~~ for each course and available to the students.

Minority Issues
Claudette Morton, MSSA – National Council for Accreditation of Teacher Education accredits educator preparation programs across the country, including five of the eight professional education units in Montana. By deleting the

language, "… with such license granted as a result of the completion of a professional educator preparation program accredited by NCATE and/or a state board of education.", Montana has restricted qualified educators from providing Montana students with distance and online learning opportunities not offered in their schools.

Brian Patrick, SAM – The deletion of the language as proposed will restrict students from taking courses that are not currently offered in our public schools. A student who would like to take a world language not offered in the local public school is restricted from taking that course from an out-of-state provider if that provider is not licensed and endorsed in Montana. In some cases courses offered through distance, online, and technology delivered learning are courses that are not endorsable because Montana does not offer an educator preparation program in that content area. It is unfair to our Montana students to limit their educational offerings simply because Montana does not offer the endorsement program. If an instructor meets the highly qualified standard in another state, our language should be flexible enough to provide a reciprocal agreement with that instructor and state.

Bruce Whitehead, SAM – Using teachers and facilitators from NCATE accredited schools, as an option, will broaden the availability and access of programs for many students in Montana. It is my opinion that NCATE maintains very high quality standards of excellence and thus NCATE endorsed programs should meet most of the criteria required by Montana licensure and endorsement standards.

Montana Board of Public Education
Distance Learning Task Force

Task Force Consideration of Proposals 4-8
January 6, 2007

During the discussion of ARM 10.55.907 (3) (c) several Task Force members commented that the remaining Proposals 4 - 8 should be discussed together, since they all either amended or added to ARM 10.5.907.

Chairman Kirk Miller introduced Linda Vrooman Peterson, who gave the Sub-Committee rationale concerning each of the proposals. A Task Force member called for the question, asking that all four proposals be discussed together; there was a second. A brief discussion ensued; in a vote, task force members voted to discuss Proposals 4-8 together.

The proposals follow, with their rationales:

Sub-Committee Proposal 4
ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED LEARNING
(3)(a) When a teacher of distance, online, and technology delivered learning programs and/or courses is not licensed and endorsed as provided in this rule, does not possess the qualifications specified in (3) above, the facilitator must hold a Montana educator license be licensed and endorsed in Montana in the area of instruction facilitated.

> **Sub-Committee Rationale**
> Instruction of a course is more than knowledge of the content. It is imperative that the facilitator be a teacher of the content to ensure that the learning environment and support instructional methods are appropriate to the learning situation.

Sub-Committee Proposal 5
ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED LEARNING
(3)(b) When a teacher of distance, online, and technology delivered learning programs is licensed and endorsed in the area of instruction, qualified as provided in this rule (3) above, the receiving school district's facilitator shall be a licensed teacher or a para-educator.

> **Sub-Committee Rationale**
> The teacher providing the content, instruction and communication is licensed and endorsed in the content area; therefore, the receiving learning setting requires a licensed teacher or qualified para-educator to maintain the general learning environment.

Sub-Committee Proposal 6
ARM 10.55.907   DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED LEARNING
        (3)(c) School districts receiving distance, online, and technology delivered learning programs and/or courses must provide qualified facilitators for synchronous delivery, requiring physical presence of a facilitator, and for asynchronous delivery, requiring facilitators be available to students.

        Sub-Committee Rationale
        Because the delivery of distance, online, and technology delivered programs and/or courses varies, facilitators are necessary in all situations.

Amended by the Task Force on January 6, 2007

         (3)(c) School districts receiving distance, online, and technology delivered learning programs and/or courses must provide qualified facilitators for synchronous delivery, **to students in Montana Board of Public Education accredited schools,** requiring physical presence of a facilitator, and for asynchronous delivery, requiring facilitators be available to students.

Sub-Committee Proposal 7
        (5)   All providers and coordinating entities of distance, online, and technology delivered learning programs, other than Montana school districts, shall annually, no later than October 1:

        Sub-Committee Rationale
        Data are required to ensure quality of instruction and program.

Amended by the Task Force on January 6, 2007
         (5) All providers **or** coordinating entities…

When the amended Proposal 7 was considered, it passed 10 - 8 / 1 abstention. The minority issues articulated by Task Force members are delineated below.

Sub-Committee Proposal 8
        (5)(c) ~~verify~~ document the professional qualifications, including Montana teacher licensure and endorsement if possessed, of their teachers of distance, online, and technology delivered programs and/or courses;

Sub-Committee Rationale
Documentation of qualifications is required in the accreditation and licensure processes.

Proposal 7 was approved by the Task Force as amended on January 6, 2007

(5) <u>All</u> providers <u>or coordinating entities</u> of distance, online, and technology delivered learning programs, other than Montana school districts, shall annually, <u>no later than October 1</u>:

Proposal 7 Minority Issues
We need accurate data, therefore, all providers and coordinating entities should report the data to determine exactly who is providing distance, online, and technology delivered programs and/or courses. Once we have the accurate data the reporting process may be streamlined.

Following the presentation of proposals 4-8 and their rationales, there was considerable comment and discussion.
Proposals 4, 5, 6, 8 passed, by the following recorded votes: 3 No votes (Claudette Morton, Brian Patrick, Bruce Whitehead); 1 abstention (Darrell Rud), and 15 yes.

Proposal 4, 5, 6, and 8 were approved by the Task Force as amended on January 6, 2007

ARM 10.55.907   DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED LEARNING
(3)(a)   When a teacher of distance, online, and technology delivered learning programs and/or courses ~~is not licensed and endorsed as provided in this rule~~, <u>does not possess the qualifications specified in (3) above,</u> the facilitator must ~~hold a Montana educator license~~ <u>be licensed and endorsed in Montana in the area of instruction facilitated.</u>
(b) When a teacher of distance, online, and technology delivered learning programs is ~~licensed and endorsed in the area of instruction,~~ qualified as provided in ~~this rule~~ <u>(3) above</u>, the receiving school district's facilitator shall be a licensed teacher or a para-educator.
<u>(c) School districts receiving distance, online, and technology delivered learning programs and/or courses must provide qualified facilitators for synchronous delivery,</u> **to students in Montana Board of Public Education accredited schools,** <u>requiring physical presence of a facilitator, and for asynchronous delivery, requiring facilitators be available to students.</u>

Montana Board of Public Education
Distance Learning Task Force

Task Force Consideration of Proposals 4-8
January 6, 2007

ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED LEARNING
(5)(c) ~~verify~~ <u>document</u> the professional qualifications, including Montana teacher licensure and endorsement if possessed, of their teachers of distance, online, and technology delivered programs and/or courses;

Proposals 4- 8 Minority Issues
The minority issues related specifically to proposal 4.
(3)(a) When a teacher of distance, online, and technology delivered learning programs and/or courses ~~is not licensed and endorsed as provided in this rule~~, <u>does not possess the qualifications specified in (3) above,</u> the facilitator must ~~hold a Montana educator license~~ <u>be licensed and endorsed in Montana in the area of instruction facilitated.</u>

Claudette Morton, MSSA – When the teacher of a distance, online, and technology delivered course is not licensed and endorsed in Montana in the content area taught, expecting that all facilitators be licensed and endorsed in Montana in the content area of that distance, online, and technology delivered course is too great a burden for Montana schools. If the school does indeed employ a licensed and endorsed teacher in the content area, it might be assumed the on-site teacher could teach the course. The point is that there are courses not available to Montana students because of limited resources for schools to offer the range of courses students may want to take. For Montana's smallest schools, certain content areas are "hard to fill." In these circumstances school districts may have tried unsuccessfully for several years to employ, for example, a teacher of world languages licensed and endorsed in Montana. If the school cannot fill the position with a licensed teacher, it is highly doubtful that the school would find a licensed and endorsed facilitator to monitor the learning environment.

Brian Patrick, SAM –The proposed amendment would unfairly restrict Montana students from taking courses that are not currently offered in our public schools. For example, a student who would like to take a world language not offered in the local public school is restricted from taking that course from an out-of-state provider if that provider is not licensed and endorsed in Montana because there would be no facilitator so qualified by Montana licensure. If a district has a licensed teacher in the subject matter being taught, the district would likely not be utilizing an on-line class.

**Montana Board of Public Education
Distance Learning Task Force**

**Task Force Consideration of Proposals 4-8
January 6, 2007**

Proposals 4- 8 Minority Issues

Bruce Whitehead, SAM – Using teachers and facilitators from NCATE accredited schools, as an option, will broaden the availability and access of programs for many students in Montana. It is my opinion that NCATE maintains very high
quality standards of excellence and thus NCATE endorsed programs should meet most of the criteria required by Montana licensure and endorsement standards.

Montana Board of Public Education Distance Learning Task Force

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Proposed Amendments of Administrative Rules of Montana

ARM 10.55.602 Definitions
ARM 10.55.701 Board of Trustees
ARM 10.55.907 Distance, Online, and Technology Delivered Learning

Montana Board of Public Education
Distance Learning Task Force

Administrative Rules of Montana 10.55.602 Definitions
Amended by the Distance Learning Task Force
January 6, 2007

ARM 10.55.602 DEFINITIONS For the purposes of this chapter, the following terms apply:
(1) "Assessment" means the gathering, organizing, and evaluation of information about student learning in order to monitor and measure the effectiveness of the instructional program.

(2) "Asynchronous" means not occurring at the same time. "Asynchronous" refers to content, instruction and communication between participants (e.g., students and teachers) that occurs at different times, the period of which may vary by circumstance. (e.g., e-mail, threaded discussions, homework, message boards).*See also synchronous.*

(2) (3)"Benchmark" means expectations for a student's knowledge, skills, and abilities along a developmental continuum in each content area. That continuum is focused at three points: the end of grade 4, the end of grade 8, and upon graduation (grade 12).
(3) (4)"Certification" means licensure of an educator/ specialist, as issued by the state of Montana, based on completion of an approved teacher, administrator or specialist program of an accredited college/university. Certification includes grade level(s), endorsement(s) and classification.
(4) (5) "Combined elementary-high school district" means an elementary district and a high school district which are combined for district administration purposes, including districts designated as "K-12 districts" pursuant to 20-6-701, MCA. Most town school districts in Montana would fit this category, i.e., Helena, Hamilton, Whitehall.
(5) (6) "Content standard" means what all students should know, understand and be able to do in a specific content area, such as reading, mathematics, or social studies.
(6) (7)"Deviation" means a citation of non-compliance with any given standard.

(8) " Distance learning" means instruction in which students and teachers are separated by time and/or location with synchronous or asynchronous content, instruction and communication between student and teacher. (e.g., correspondence courses, online learning, videoconferencing, streaming video).

(7) (9) "Endorsement" means an official indication on a license of the subject area(s) and/or specialized program area(s) for which the holder of the license is

Administrative Rules of Montana 10.55.602 Definitions (continued)
Amended by the Distance Learning Task Force
January 6, 2007

authorized to practice in Montana accredited schools.

(8) (10) "Independent elementary school district" means a district organized for the purpose of providing public education for all or any combination of grades kindergarten through 8.

(9) (11) "Part-time" means not less than six hours in a school week.

(10) (12) "Performance standard" means the specific expectations for performance in each content area at each of the three benchmarks. Performance standards define the quality of performance and describe the performance to be demonstrated.

(11) (13)"Program area standards" means the subject matter Montana school districts are required to offer and the strategies and proven practices used to instruct. The program area standards include: communication arts, arts, health enhancement, mathematics, science, social studies, career and vocational/technical education, technology, workplace competencies, library media, world languages and school counseling.

(12) (14) "Program delivery standards" means the conditions, practices and resources school districts are required to provide for all students to have educational opportunities to learn, develop and demonstrate learning to content and performance standards.

(15) "Online learning" means education activity in which instruction and content are delivered primarily via the Internet. Online learning is a form of distance learning.

(13) (16) "School administrator" means a person who is a part of the school's administrative or supervisory staff and who holds a class 3 license and is appropriately endorsed, or who is enrolled in a Board of Public Education approved administrator internship program under ARM 10.55.702 through 10.55.705.

(17) "Synchronous" means occurring at the same time. "Synchronous" refers to content, instruction and communication between participants (e.g., students and teachers) that occurs at the same time even though they may be in different physical locations. For example, instruction in which students and teachers are online at the same time so that a question can be immediately answered. (e.g., telephone calls, face-to-face meetings, physical classrooms, chat rooms, and videoconferencing). *See also asynchronous.*

(18) "Technology delivered learning" means instruction and content delivered via digital technologies (e.g., online, CD-ROM, DVD-ROM or learning experiences that involve primarily the use of computers).

Administrative Rules of Montana 10.55.602 Definitions (continued)
Amended by the Distance Learning Task Force
January 6, 2007

(History: 20-2-114, MCA; IMP, 20-2-121, 20-3-106, 20-7-101, MCA; NEW, 1989 MAR p. 342, Eff. 7/1/89; AMD, 1998 MAR p. 2707, Eff. 10/9/98; AMD, 2000 MAR p. 3340, Eff. 12/8/00; AMD, 2001 MAR p. 953, Eff. 6/8/01; AMD, 2002 MAR p. 3309, Eff. 11/28/02; AMD, 2003 MAR p. 2080, Eff. 9/26/03.)

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Montana Board of Public Education
Distance Learning Task Force

Administrative Rules of Montana 10.55.701 Board of Trustees
Amended by the Distance Learning Task Force
January 6, 2007

ARM 10.55.701 BOARD OF TRUSTEES (1) The board of trustees shall ensure that the school district complies with all local, state, and federal laws and regulations.

(2) The board of trustees shall provide in each school building at least one copy of the accreditation standards for staff and public review.

(3) Each school district shall have in writing and available to the staff and public:

(a) a comprehensive philosophy of education;

(b) goals that reflect the district's philosophy of education;

(c) sequential curricula for each program area that aligns to the content and performance standards and the district's educational goals;

(d) policies establishing student assessment procedures that ensure evaluation of the school's curricula and student learning. These procedures shall specify how and when data are to be collected, analyzed, and reported;

(e) policies that delineate the responsibilities of the board, superintendent, and personnel employed by the school district. The trustees shall review these policies on a regular basis and make them available to employees and the public;

(f) a policy on student, parent, and school employee due process rights;

(g) a policy that is designed to address bullying, intimidation, and harassment of students and school personnel;

(h) an equity policy;

(i) a transfer policy for determining the appropriate placement of incoming students;

(j) an academic freedom policy;

(k) a materials selection policy, including a challenge procedure, for all curricular and support materials;

(l) a copyright policy;

(m) a policy that defines the use of school facilities and resources;

(n) a parent involvement policy that encourages:

(i) regular, two-way and meaningful communication between home and school;

(ii) promotion and support of parenting skills;

(iii) that parents play an integral role in assisting student learning;

(iv) that parents are welcome in the school, and that their support and assistance are sought;

(v) parents as full partners in the decisions that affect children and families; and

(vi) community resources be used to strengthen schools, families, and student

Administrative Rules of Montana 10.55.701 Board of Trustees
(continued)
Amended by the Distance Learning Task Force
January 6, 2007

learning; ~~and~~

 (o) a policy that incorporates the distinct and unique cultural heritage of American Indians and that is aligned with district educational goals~~.~~ ; and

(p) a policy addressing distance, online, and technology delivered learning as defined in ARM 10.55.602.

 (4) The board of trustees shall have valid, written contracts with all regularly employed certified administrative, supervisory, and teaching personnel.

 (5) The board of trustees shall have written policies and procedures for regular and periodic evaluation of all regularly employed certified administrative, supervisory, and teaching personnel. The individual evaluated shall have a written copy of the evaluation, the opportunity to respond in writing to the evaluation, and access to his/her files. Personnel files shall be confidential.

 (6) The board of trustees shall establish conditions that contribute to a positive school climate and morale by encouraging cooperative and harmonious relationships among the staff members, students, parents, and community.

 (7) To enhance a positive learning environment, the board of trustees shall:

 (a) establish a system to keep parents/guardians up to date on students' progress;

 (b) use technology and equipment to facilitate management and instruction.

 (8) To ensure continuous education improvement, the district shall engage in a continuous school improvement process. (History: 20-2-114, MCA; IMP, 20-2-121, MCA; NEW, 1989 MAR p. 342, Eff. 7/1/89; AMD, 2000 MAR p. 3340, Eff. 12/8/00; AMD, 2006 MAR p. 755, Eff. 3/24/06.)

Montana Board of Public Education
Distance Learning Task Force

Administrative Rules of Montana 10.55.907 Distance, Online, Technology Delivered Learning
Amended by the Distance Learning Task Force
January 6, 2007

ARM 10.55.907 DISTANCE, ONLINE, AND TECHNOLOGY DELIVERED LEARNING (1) This rule establishes requirements for distance, online, and technology delivered learning programs and/or courses that fulfill elementary or middle grades basic education programs and/or high school graduation requirements.

(2) School districts may receive and/or provide distance, online, and technology delivered learning programs.

(a) School districts receiving distance, online, and technology delivered learning programs to supplement instruction may utilize distance, online, and technology delivered learning as they would other supplementary resources without restriction.

(b) Distance, online, and technology delivered learning programs and/or courses shall meet the learner expectations adopted by the school district ~~or~~ and be aligned with state content and performance standards.

(c) A school district shall provide a report to the Office of Public Instruction documenting how it is meeting the needs of students under the accreditation standards who are taking a majority of courses during each grading period via distance, online, and /or technology-delivered programs.

(3) Except as provided in (3) (a) teachers of distance, online, and technology delivered learning programs shall be licensed and endorsed in Montana in the area of instruction taught ~~with such license granted as a result of the completion of a professional educator preparation program accredited by NCATE and/or a state board of education~~. School districts receiving distance, online, and technology delivered learning programs described in this rule shall have a distance learning facilitator ~~as provided in this rule assigned~~ for each course and available to the students.

(a) When a teacher of distance, online, and technology delivered learning programs and/or courses ~~is not licensed and endorsed as provided in this rule~~, does not possess the qualifications specified in (3) above, the facilitator must ~~hold a Montana educator license~~ be licensed and endorsed in Montana in the area of instruction facilitated.

(b) When a teacher of distance, online, and technology delivered learning programs is ~~licensed and endorsed in the area of instruction,~~ qualified as provided in ~~this rule~~ (3) above, the receiving school district's facilitator shall be a licensed teacher or a para-educator.

(c) School districts receiving distance, online, and technology delivered

Administrative Rules of Montana 10.55.907 Distance, Online, Technology Delivered Learning (continued)
Amended by the Distance Learning Task Force
January 6, 2007

learning programs and/or courses must provide qualified facilitators for synchronous delivery, to students in schools accredited by the Montana Board of Public Education, requiring physical presence of a facilitator, and for asynchronous delivery, requiring facilitators be available to students.

(c) (d) The school district must ensure that the distance, online, and technology delivered learning facilitators, whether licensed or not, receives in-service training on technology delivered instruction pertaining to:

(i) the course organization;

(ii) classroom management;

(iii) technical aspects of the delivery method;

(iv) strategies for use of distance learning;

(v) monitoring of student testing;

(vi) and securing other services as needed.

(4) Montana school districts providing distance, online and technology delivered learning shall comply with the teacher load requirements of ARM 10.55.713(3).

(5) All Pproviders or coordinating entities of distance, online, and technology delivered learning programs, other than Montana school districts, shall annually no later than October 1:

(a) register with the Office of Public Instruction;

(b) identify all Montana school districts to whom they are providing distance, online, and technology delivered programs and/or courses;

(c) verify document the professional qualifications, including Montana teacher licensure and endorsement if possessed, of their teachers of distance, online, and technology delivered programs and/or courses;

(d) provide the course description including the content and delivery model for each distance, online, and technology delivered program and/or course provided to Montana schools; and

(e) demonstrate that the students they serve have ongoing contact with their teachers of distance, online, and technology delivered learning programs and/or courses. (History: 20-2-114, MCA; IMP, 20-2-121, 20-3-106, 20-7-101, MCA; NEW, 1989 MAR p. 342, Eff. 7/1/89; AMD, 1995 MAR p. 626, Eff. 4/28/95; AMD, 1998 MAR p. 2707, Eff. 10/9/98; AMD, 2000 MAR p. 3340, Eff. 12/8/00; AMD, 2004 MAR p. 719, Eff. 4/9/04.)

Montana Board of Public Education
Distance Learning Task Force

APPENDICES

Montana Board of Public Education
Distance Learning Task Force

Appendix A

References

Montana Board of Public Education
Distance Learning Task Force

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Montana Board of Public Education
Distance Learning Task Force

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Appendix B

Voting Task Force Members

Montana Board of Public Education
Distance Learning Task Force

Voting Members	Constituent Groups
Storrs Bishop	Board of Public Education
Peter Donovan	
Michael Hall	Office of Public Instruction
Dulce Whitford	Montana Indian Education Association
Eric Feaver	MEA-MFT
Larry Nielsen	
Eric Burke	
Desiree Caskey	Montana Council for Computers in Education
Dave Puyear	Montana Rural Education Association
Claudette Morton	Montana Small Schools Alliance
Lance Melton	Montana School Boards Association
Denise Thompson	
Tom Gibson	Office of Commissioner of Higher Education
Dee Maclean	Montana Parent Teachers Association
Jan Lombardi	Office of the Governor
Darrell Rud	School Administrators of Montana
Brian Patrick	
Bruce Whitehead	
Chris Olszewski	Montana Curriculum Consortia
Larry Baker	Montana Council of Deans of Education

Alternate Voting Members

Bob Vogel	Lance Melton, MTSBA
	Dave Puyear, MREA
Jim Sadler	Denise Thompson, MTSBA
Tom Rogers	Dave Puyear, MREA
Marco Ferro	Erik Burke, MEA-MFT
John Hughes	Larry Nielsen, MEA-MFT

Distance Learning Task Force Co-Chairs – Non-Voting

Kirk Miller	Board of Public Education
Bud Williams	Office of Public Instruction

Montana Board of Public Education
Distance Learning Task Force

Appendix C

Task Force Members and Alternates

Montana Board of Public Education
Distance Learning Task Force

Members	Constituent Groups
Storrs Bishop	Board of Public Education
Peter Donovan	
Michael Hall	Office of Public Instruction
Dulce Whitford	Montana Indian Education Association
Eric Feaver	MEA-MFT
Larry Nielsen	
Eric Burke	
Desiree Caskey	Montana Council for Computers in Education
Dave Puyear	Montana Rural Education Association
Claudette Morton	Montana Small Schools Alliance
Lance Melton	Montana School Boards Association
Denise Thompson	
Tom Gibson	Office of Commissioner of Higher Education
Dee Maclean	Montana Parent Teachers Association
Jan Lombardi	Office of the Governor
Darrell Rud	School Administrators of Montana
Brian Patrick	
Bruce Whitehead	
Chris Olszewski	Montana Curriculum Consortia
Larry Baker	Montana Council of Deans of Education

Alternates

Bob Vogel	Lance Melton, MTSBA
	Dave Puyear, MREA
Jim Sadler	Denise Thompson, MTSBA
Tom Rogers	Dave Puyear, MREA
Marco Ferro	Erik Burke, MEA-MFT
John Hughes	Larry Nielsen, MEA-MFT

Distance Learning Task Force Co-Chairs

Kirk Miller	Board of Public Education
Bud Williams	Office of Public Instruction

Records Facilitator

Janet Thomson

Montana Board of Public Education
Distance Learning Task Force

Staff
Board of Public Education
Steve Meloy
Carol Will

Office of Public Instruction
Linda Vrooman Peterson
Gary Warhank
Genna Ibsen
Nancy Coopersmith
Kathleen Mollohan
Lorraine Burns

Montana Board of Public Education Distance Learning Task Force

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Appendix D

Agenda and Meeting Notes

December 4, 2006

Montana Board of Public Education
Distance Learning Task Force

December 4, 2006   10:00 a.m. – 3:00 p.m.
Red Lion Colonial Inn – Executive Room
Helena, Montana
Agenda

+ **Welcome and Introductions**

+ **Purpose, Charge, and Guiding Principles**

+ **Ground Rules**

+ **State of Distance Learning**

+ **Overview of ARM 10.55.907 – Distance, Online, and Technology Delivered Learning**

+ **When I think about distance learning, I'm most concerned about…?**

+ **Small Group Work/Reporting – Review Research Material**

+ **Wrap Up and Set Agenda for December 15 Meeting**

Montana Board of Public Education
Distance Learning Task Force
December 2006

Consensus Process

Creating Task Force Final Recommendation

The final report of the deliberation of the Task Force will be prepared for the BPE and will provide complete information on items considered using the consensus process.

- Unanimous Consensus – All members agree with this issue recommended

- Consensus – A majority of the members agree with issue recommended. Majority and minority opinion may be listed in the report.

- Considered but not recommended – Issue was unable to get a majority of the members to support. Majority and minority opinion may be listed in the report.

Administrative Rules of Montana (ARM) 10.55.907

Board of Public Education Rules regarding Distance, Online, and Technology Delivered Learning were first promulgated in the spring of 1989 and became effective July 1 of the same year. Since that time the rule has been amended in 1995, 1998, 2000, and 2004. From 1989 through 2000 the rule remained fairly simplistic with no definition and few implementation guidelines. The original rule made no reference to supplementing instruction; however it did require teachers of distance learning to be certified and appropriately endorsed in Montana. If the teacher could not meet certification criteria, distance learning was allowed with a facilitator in a receiving classroom who was required to be certified in Montana, but not necessarily endorsed in the area of assignment.

In 2000 the board expanded the rule and it began to take the shape of the rule we have in place today. In 2000 distance learning was defined as *technology-assisted individual and classroom instruction that connects students and teachers who are physically removed from each other.* Supplementation was addressed in 2000 and was allowed by rule just as other supplementary classroom resources are allowed. The language regarding teachers, certification, and endorsement remained essentially the same. However, added was language that relieved the facilitator from a certification or endorsement requirement provided the teacher is properly certified and endorsed in the area of instruction. Class size was also addressed in 2000.

In 2004 the board required that a receiving school district's facilitator shall be a licensed teacher or a para-educator even if the teacher of distance delivered learning is licensed and endorsed. Also new was the requirement that all providers identify every school district in which they are providing services. The 2004 revisions paid specific attention to the credentials of those providing distance learning. Language was added to require a facilitator to receive service training on technology delivered service training. The question of ANB was raised at the hearing but it was clarified that nothing in this rule expands or changes provisions for calculating ANB.

In 2004 the changes were largely based upon recommendations of a large committee made up of educators and all of our partners. The Board of Public Education and the Office of Public Instruction requested amendments to 10.55.907 for the following reasons:
- update reporting procedures and timeline given new electronic annual data collection reporting process;
- reflect the changing nature of distance learning since the current rule was adopted; and
- address the need to provide training for facilitators of distance, online, and technology delivered education.

Prepared by Steve Meloy, Executive Secretary, Montana Board of Public Education
Presented to the Distance Learning Task Force, December 4, 2006

Montana Board of Public Education
Distance Learning Task Force
December 2006

Ground Rules

Address the Co-Chairs

Be respectful of others

One person speaks at a time

Listen carefully

Allow everyone to participate

**Consider solutions with an
     open mind**

Montana Board of Public Education
Distance Learning Task Force

Helena, Montana
Meeting Notes

Date: December 4, 2006
Location: Red Lion Colonial Hotel 10:00 A.M. – 3:00 P.M.

Task Force Members Attending: Bud Williams, Denise Thompson, Chris Olszewski, Dave Puyear, Eric Fever, Storrs Bishop, Bruce Whitehead, Brian Patrick, Larry Neilson, Thomas Gibson, Kirk Miller, Eric Fever, Michael Hall, Erik Burke, Bob Vogel, Claudette Morton

Records Facilitator: Janet Thomson

Staff: Gary Warhank, Nancy Coopersmith, Carol Will, Steve Meloy, Genna Ibsen and Linda Vrooman Peterson,

The first meeting of the Montana Board of Public Education Distance Learning Task Force was called to order by Co-Chairmen Kirk Miller, Board of Public Education, and Bud Williams, Office of Public Instruction. The Co-Chairs welcomed the Task Force asking the members to introduce themselves.

Dr. Miller discussed the purpose, guiding principle and charge of the Task Force work. Align ARM 10.55.907 with best practices for future, meeting student needs, allowing flexibility without sacrificing quality. See BPE purpose, guiding principal, and charge Discuss the Purpose – Align standard with current best practices

- Purpose – Align ARM10.55.907 with best practices
- Guiding Principle – Serve student learning needs, present and future, flexibility and quality
- Charge – Make recommendations to BPE to amend 10.55.907. BPE will use public hearing MAPA process to hear input on recommended amendments.

Mr. Williams presented some of the issues and concerns related to distance learning: Is there a limit to the percentage of time allowed for distance learning course work? How are correspondence courses addressed? How are credits defined? Is there a difference between a distance, online, and technology delivered credit and a credit earned in a brick and mortar classroom? What are the funding issues related to such distance learning courses?

Bud Williams provided the Task Force with the ground rules to facilitate the deliberative process.

The final report of the deliberation of the Distance Learning Task Force will be prepared for the BPE. The report will provide complete information on items considered using the consensus process:

- Unanimous Consensus – All members agree with this issue recommended
- Consensus – A majority of the members agree with issue recommended. Majority and minority opinion may be listed in the report.
- Considered but not recommended – Issue was unable to get a majority of the members to support. Majority and minority opinion may be listed in the report.

Steve Meloy, Executive Secretary of the Board of Public Education, reviewed the history of ARM 10.55.907 and its amendments of 2000, and of 2004.

Dr. Janet Thomson delivered a one-hour PowerPoint presentation, briefing members on the "State of Distance Learning". The presentation included the status of distance learning in other states, nations, and private initiatives. Each member received copies of all of the research reports reviewed. Following the presentation members responded to a question in order to elicit their concerns: "When I think about distance learning, I'm most concerned about…?" [Answers to this question were used to focus the agenda for the second meeting]

Task Force members joined small groups of their choosing in order to briefly review research materials together, and to formulate possible discussion points and issues of interest. The small group discussions were focused into three topics: Quality Instruction, Educator Preparation/Professional Development, and Policy and Funding. Groups reported out their concerns at the end of the day. The group collectively set the agenda for the second meeting on December 15, 2006.

Montana Board of Public Education Distance Learning Task Force

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Appendix E

Small Group Work

December 4, 2006

Distance Learning Task Force
December 4, 2006
Small Group Work—Quality Instruction

(1)   What did you learn?
- i)   Have to have quality
    - (a) Job # 1
- ii)   Quality F2F with quality on-line (environment)
- iii) Different level of pedagogy and methods
- iv) Address needs of diverse learners (at risk)
- v)   Quality facilitation at the local level
- vi) Characteristics of successful distance learners
- vii) Quality Instructors
    - (a) Licensure

(2)   What are your priority issues?
- i)   Equivalency of content (meets local curriculum adopted by school district and aligned with Montana Standards)
- ii)   Number of students in a class
    - (a) Student load
    - (b) New standards for all
- iii) Policies that ensure full range of the qualities of instruction that was addressed
    - (a) i.e. Teacher licensure (including area of special competency)
    - (b) Training of facilitators
    - (c) Class size (all providers)
    - (d) On-line pedagogy
    - (e) Curriculum

- iv) Evaluation Process
    - (a) Police registration

(3)   What other information do you need?
- i)   Evaluation process—what have others done?
- ii)   What are quality facilitators?
- iii) What is the university system doing to train teachers to deliver distance education?

Michael Hall
Storrs Bishop
Claudette Morton
Larry Nielsen

Distance Learning Task Force
December 4, 2006
Small Group Work - Professional Development

What did you learn – What do you value

---   Qualifications for educators
---   Student knowledge of computer & web is oriented
     to entertainment – Students need to take a "pre – on line course so students are
     ready for on – line learning
---   Problem: deliverability & sustainability need ability for equipment to work –
     need support – need pilot for deliverability
---   Professional Development must include training on how to operate & how to
     trouble shoot
---   New professional development topics such as "how to teach on – line
---   New vocabulary needed
---   Important to have written interaction
---   This is a new way to teach
---   Instruction must be succinct & well planned
     -    "it took) semesters to make a quality course."
---   Need professional development plan that is on – going
---   Need mentoring plan

Priorities

---   Need regional centers for Professional Development
     -    utilize experience & mentors
     -    utilize University/system
     -    centers could be self sustaining
     -    learn from other rural states success
---   Staff development in pairs or small groups

Priorities for the rule (concerning professional development

---   Regional centers for distance learning
---   Mentoring/peer
---   On – line --- Need specific knowledge base pedagogy for teachers & must be
     included in teacher & paraprofessional training & professional development
---   Need standards for professional development provides and content & sites
---   Higher Ed & Teachers prep programs
---   Must include on – line strategies
---   On – going professional development must not duplicate Higher Ed preparation
     for teachers already teaching

--- Need funding - Need infrastructure
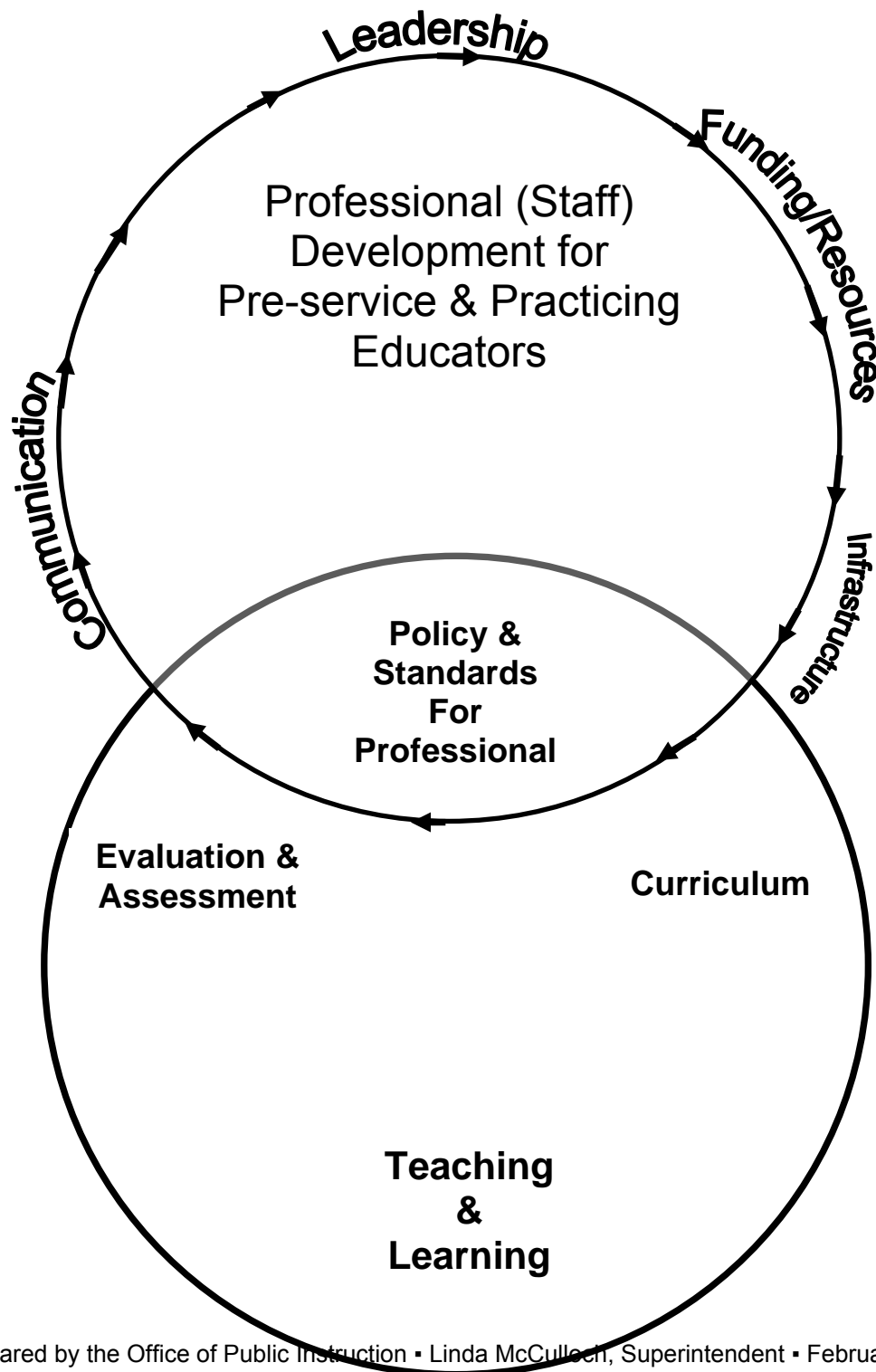--- Need leadership, assessment

What Other Information Do You Need?

--- Learn from experiences & others in distance learning in other rural, small states
--- Learn from regional providence in other states
--- Addressing minority students, culture and issues
--- Funding – source? Need intense investment to make it work right
--- More information on infrastructure in Montana
- Coordinators in Montana?
- What districts' capacity? Platform
- What funding is needed?
--- What are core principals for teachers preparation & for the platform
--- Is the professional development marketable?

--- Teachers interest & needs for professional development
--- More information on terminology –
"distance learning"
"dual credit"
"online learning"
"correspondence courses"
--- What are Universities teaching now & what are they planning to teach pre-service teachers & practicing teachers
What is the cost? – Prerequisites?

Denise Thompson
Erik Burke
Bruce Whitehead
Chris Olszewski
Brian Patrick

Distance Learning Task Force
December 4, 2006
Small Group Work - Professional Development Map

Leadership

Funding/Resources

Professional (Staff)
Development for
Pre-service & Practicing
Educators

Communication

Infrastructure

**Policy &
Standards
For
Professional**

**Evaluation &
Assessment**

Curriculum

**Teaching
&
Learning**

Distance Learning Task Force
December 4, 2006
Small Group Work - Policy/Funding

What Learned?

Question # 1
  i) Cost a lot of money
        (a) 1.6 million To start
        (b) 3000-6000 per student

  ii) Augenblick may over value e-learning and under value direct instruction

  iii) In Montana we need to honor local control

  iv) From a policy point of view ANB rules lend life to this
        (a) Distance Learning
        (b) Dual Enrollment
        (c) Extra money to provide both services

  v) We are paying schools to provide a service to students, some notion of oversight.

  vi) Need to explore who is doing this now—what is out there—more accountability (list of providers and how long and what, to whom and what?)

Question #2—Policy Issue, ANB Funding
  i) What is the threshold for funding? Via Distance Learning
        (a) Hallway time?
        (b) Flexibility to account for this

  ii) Credit is irrelevant

  iii) We need to identify that one credit is the same no matter how presented.

  iv) What about Plato?

  v) How do we define Distance Learning?
        What is accepted and what is not?

  vi) Quantity of Distance Learning—what is the percent?
        (a) How do you decide if the quality is there?
        (b) How do you meet the outcomes?

  vii) How much do we want to see the student face to face?

        (a) 1/6 time might work?

viii)   Would definition deal with Plato and correspondence courses?

ix) SB 152 speaks to quality and not time.

x) On-line courses must align curriculum with state standards.

Bud Williams
Eric Feaver
Bob Vogel
Tom Gibson
Dave Puyear
Darrell Rud
Steve Meloy

Montana Board of Public Education Distance Learning Task Force

Appendix F

Agenda and Meeting Notes

December 15, 2006

Montana Board of Public Education
Distance Learning Task Force

December 15, 2006   10:00 a.m. – 4:00 p.m.
Red Lion Colonial Inn – Lewis Room
Helena, Montana
Agenda

- **8:30 – 9:30 a.m.   Preliminary Meeting – New Task Force Members**

  10:00 a.m. – 4:00 p.m.   Distance Learning Task force Work Session

- **Welcome and Introductions**
- **Purpose, Charge and Guiding Principles**
- **Ground Rules**
- **Plan for the Day**

- **Overview, observations and discussion on concerns and small group activities from December 4, 2006**

- **Office of Public Instruction Reports – Annual Data Collection and Advanced Placement**

- **Registered Providers Presentations**

- **Public Comment**

- **Policy Review and Guidelines from other States**

Montana Board of Public Education
Distance Learning Task Force

December 15, 2006   10:00 a.m. – 4:00 p.m.
Red Lion Colonial Inn – Lewis Room
Helena, Montana
Agenda (continued)

- **Rule Making Authority/Fiscal Impacts**

- **Montana Background on Policy and Research related to ARM 10.55.907**

- **Individual Activity – Further Concerns related to ARM 10.55.907**

- **Large Group Discussion Leading to Consensus**

- **Public Comment**

- **Next Steps – Seek consensus for report to the BPE**

     Proposed meeting date – Saturday, January 6, 2007, Begin with Lunch at Noon Followed by Consensus Work Session

Montana Board of Public Education
Distance Learning Task Force

Helena, Montana
Meeting Notes

Date: December 15, 2006
Location: Red Lion Colonial Hotel 10:00 A.M. – 4:00 P.M.

Co-Chairs: Kirk Miller and Bud Williams
Records Facilitator: Janet Thomson

The meeting was called to order by Co-Chairs Kirk Miller and Bud Williams. The Co-Chairs reviewed the Distance Learning Task Force purpose, charge, guiding principles, consensus process, and the ground rules with the task force.

Task Force members who had been unable to attend the first meeting were briefed in a one-hour session by Dr. Miller, Bud Williams, and Dr. Thomson.

The purpose, charge and guiding principles were again quickly reviewed, and Task Force members received a synopsis of the concerns generated in the December 4 Task Force meeting. Dr. Thomson reviewed these, asking participants to (for themselves) identify their biggest concerns, holding these for later possible discussion.

The OPI Staff summarized K-12 data collected concerning Distance Learning and Advanced Placement in Montana. Registered providers of Distance Learning in Montana gave presentations or provided written summaries of their programming, as a means to give the Task Force an idea of who presently provides Distance Learning in Montana schools. Policies and practices from other states were noted in an update presentation. The BPE staff discussed rule making authority and the OPI staff reviewed the fiscal impact, as well as further background on ARM 10.55.907, as requested by individual questions. Each Task Force member was given the opportunity to respond to further concerns about Distance Learning.

The Task Force agreed to meet on January 6, 2007 to consider draft proposals for new language. All members were given the opportunity to participate in Sub-Committee meetings convened in late December for the purpose of drafting possible amendments to ARM 10.55.907. [Sub-Committee members met with Dr. Linda V. Peterson to draft amendments.]

Montana Board of Public Education Distance Learning Task Force

Appendix G

Agenda and Meeting Notes

January 6, 2007

Montana Board of Public Education
Distance Learning Task Force

January 6, 2007 1:00 p.m. – 4:00 p.m.
Board Room – Montana Schools Boards Association
Helena, Montana
Agenda

Consensus Work Session Agenda

- **Welcome and Introductions**

- **Identification of Task Force Members**

- **Clarification of Consensus Process**

- **Overview of the Recommendations from the Distance Learning   Task Force Sub-Committee**

  - **ARM 10.55.907Distance, Online, and Technology Delivered Learning**
  - **ARM 10.55.701 Board of Trustees**
  - **ARM 10.55.602 Definitions**

- **Consensus of Building for Each Recommendation of the Sub-Committee**

- **Consideration of Additional Rule Revisions from the Task Force**

Montana Board of Public Education
Distance Learning Task Force

January 6, 2007   1:00 p.m. – 4:00 p.m.
Board Room – Montana School Boards Association
Helena, Montana
Agenda (continued)

Public Comment

Next Steps

- o **Prepare Final Recommendations and Consensus Report for Board of Public Education**
- o **Discussion of Phase II**

Thank you for your professional commitment, forward thinking, and willingness to work for consensus during this important process.

As Garrison Keillor would say,

"Be well,

Do good work, and

Keep in touch."

Montana Board of Public Education
Distance Learning Task Force

Helena, Montana
Meeting Notes

Date: January 6, 2007
Location: Board Room – Montana School Boards Association
1:00 P.M. – 4:00 P.M.

Co-Chairs: Kirk Miller and Bud Williams
Records Facilitator: Janet Thomson

The Task Force considered 14 proposed changes to ARM 10.55.907. Changes to definitions [ARM 10.55.602] were considered first, as these impacted all other proposed changes. The Task Force approved the additions to definitions (Proposals 10-14) by consensus, with one member abstaining.

The Task Force reached consensus [one member abstaining] on an addition to ARM 10.55.701 (Proposal 9, as amended) concerning local control—a requirement that local Boards of Trustees have a written policy addressing distance, online, and technology delivered learning.

Proposal 1- approved by consensus ;(1 abstention)
Proposal 2 - amended and approved by consensus (1 abstention);
Proposal 3 - amended and approved by consensus (3 voting no, 1 abstention)—minority report rationale provided;
Proposal 4-8 - Task Force members voted to discuss the proposals together. Proposals 4,5,6,8 were approved by consensus, with 3 members voting no, and 1 member abstaining. Proposal 7 passed 10 - 8 with 1 abstention. Minority issues were articulated by Task Force members and are included in the full report.

The Task Force identified other Distance Learning issues [Appendix E] which will be addressed in other meetings in spring and summer 2007.

Montana Board of Public Education
Distance Learning Task Force

Appendix H

Phase I

Issues and Concerns

Montana Board of Public Education
Distance Learning Task Force

December 15, 2006

Issues and Concerns*

When I think about distance learning, I am further concerned about:

Programs/Classes: Credit	• Identification of credit-are there other options other than number of hours? • A 1 credit course in the face to face school- how does it equate to a 1 credit course in distance learning? Again, quality vs. quantity. • We should look for rule or legislation that would provide 1/6 ANB for 1 unit of credit. • "Seat-time" vs. Achievement in regards to the standards. What will define credits for the online classes? • How is a credit defined- is there guidance on this from higher education who teach on-line courses? • Content equivalency-credit-ANB related issues • Concerned about alignment of Distance Learning courses with MT content and performance standards. • Are there any similarities between student on-line classes and classes teachers take on-line for college credits? • High School is not just a collection of courses or credits. •
Professional Development	•
Funding	• Content equivalency-credit-ANB related issues • Funding may well fall outside of 10.55.907, but if school districts are to deliver quality- in the best interest students-what model works so that we can afford to deliver distance education? • Buy Montana. • Is funding for distance education something that should be handled with legislation, rather than with ARM rules? • Concerned that rules will be written that will make it very expensive to use Distance Learning in a district. •

Quality: Licensure Issues	• License- Particularly for out of state provisional license. • Want to ensure that Distant learning providers are Montana based and that the teachers are Montana certified. • Does there need to be a special endorsement or

	competence of licensure of on-line K-12 teachers? • Quality-licensure-monitoring provider registration-facilitation of courses- replacement of face to face instruction when it is available. • Require licensure and endorsement of all teachers teaching distance learning. Require Licensure (class 1,2,4,6/7) of all onsite facilitators. • Certified and endorsed providing teachers should be MT licensed = appropriate quality (mandates in some cases) concerns. Facilitators should be MT certified (and endorsed if possible) small rural schools have particular staff related problems. •
Quality: Class	• A 1 credit course in the face to face school- how does it equate to a 1 credit course in distance learning? Again, quality vs. quantity. • Content equivalency-credit-ANB related issues. • I think there are resources to help evaluate quality of on-line courses, but whose responsibility /over sight does this become? How is it done with face to face and how can this model be applied to on-line? • Alignment of content to MT content and performance standards • This task force should not define a "common core"; differently than the BPE defines "the basic program. This is a way to gut education. • Side board number of distance learning core curriculum in which a student may enroll at any one time. Prohibit wholesale elimination of core curriculum-face to face-classroom instruction with distance learning. • Concerned about alignment of Distance Learning courses with MT content and performance standards. • Quality control of distance learning courses. What is in the best interest of Montana students? • Real time student to teacher contact i.e. concern of electronic correspondence course. • What other language can we put into rule that addresses quality?
Equity	• Want to ensure that special population of students (e.g., alternative school, rural, incorporated and gifted) have the outlet to access distance learning program. • Still concerned about delivery model for minority students-special education adjustments for all!
Accountability	• Tighten and refresh school district and provider reporting of one distance learning programs in which many are engaged-especially MT university system. • Who or what agency will be the watchdog of the

	Distance Learning Providers? • How many more instances are we likely to face-like Geyser-where an entire program is being delivered by distance? Should we be amending a rule to deal with an isolated instance-if in face it is isolated? •
Dual Enrollment	• Dual Enrollment-maintaining the licensed educator. • The "dual credit" language is a big part of this issue. Are we covering the topic as we should?
10.55.907	• We need to get a handle on the abuses of using distance learning by a few in regard to the benefits it can have for a larger audience. • Tighten and refresh school district and provider reporting of one distance learning programs in which many are engaged-especially MT university system. • Who or what agency will be the watchdog of the Distance Learning Providers? • Definitions should be adopted in ARM with the distance learning rules in Chapter 55 ARM. • Concerned that a Distant Learning program can completely supplant a face to face teacher-pupil program. • Concerned that rules will be written that will make it very expensive to use Distance Learning in a district. • What changes to the rule are necessary to eliminate abuse of replacing core courses with lesser quality correspondence or distance delivered courses even with face to face is available with qualified teachers – using abusing local control as the reason. If Supplement not Supplant is solve with the rule change is there need to continue with bigger issues? • How many more instances are we likely to face-like Geyser-where an entire program is being delivered by distance? Should we be amending a rule to deal with an isolated instance-if in face it is isolated?
Supplement/Supplant	• Concerned that a Distant Learning program can completely supplant a face to face teacher-pupil program. • What changes to the rule are necessary to eliminate abuse of replacing core courses with lesser quality correspondence or distance delivered courses even with face to face is available with qualified teachers – using abusing local control as the reason. If Supplement not Supplant is solve with the rule change is there need to continue with bigger issues? •

Rural Education Concerns	• Facilitators should be MT certified (and endorsed if possible) small rural schools have particular staff related problems. •
Politics	• This task force should not define a "common core"; differently than the BPE defines "the basic program. This is a way to gut (?) education. The Accreditation Standards and ___ cut funding for the system by the legislature. •
Students	• That we limit the opportunities for students by being concerned with quantity over quality. • This cannot be written in to a rule-but kids are different today, they are very comfortable with technology, many policy makers are the opposite. We need to hear the perspectives of those that this rule affects most-students! • Want to ensure that special population of students (e.g., alternative school, rural, incorporated and gifted) have the outlet to access distance learning program. • How can students be prepared for on-line learning-not just technology (time management, self-directed, etc.) • Quality control of distance learning courses. What is in the best interest of Montana students? • All students should be encouraged and have opportunities to take distance education, but not for schools to meet 10.55.801 and 10.55. 802 ARM there must be a majority of the education for all in face to face programs that utilize significant state-of-the-art tech tools. High School is not just a collection of courses or credits. • Real time student to teacher contact i.e. concern of electronic correspondence course

*These issues and concerns will be addressed by the Task Force during Phase II deliberations.

Montana Board of Public Education Distance Learning Task Force

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Appendix I

Phase II

Issues and Concerns

Montana Board of Public Education
Distance Learning Task Force

Phase II Issues

Issues are evolving, and they include:

Key Issues

Keeping Pace With K-12 Online Learning (November, 2006 NACOL)

- Program Models (for example, state-led, private, university, charter)
- Quality Assurance: content development, PD, communication requirements
- Models [synchronous, asynchronous, blended classrooms, etc.]
- Funding
- Professional development
- Highly-qualified teachers: certification and licensure
- Reciprocity, teaching across state lines
- Accountability for student outcomes (student achievement)
- Accountability/governance/oversight of state-led, non-state led programs
- Accreditation
- Policies that no longer make sense (barriers) in the online environment
- Teaching requirements specific to online environment
- NEED FOR COMMON MEASURES [Program tracking, student tracking]
- Dual Enrollment For Post-Secondary Credit (Issue is equity for low-income, minority students)
- 21st Century Skills [Skills problem-solving, creativity, communication, analytical thinking; global awareness self-directed learning, Information and communication technology literacy, time management and personal responsibility. Intentional instructional design is focus. Vision for 21st century learning in virtual schools, ways in which online learning can improve outcomes for all students.]
- Web-Enhanced Classrooms: Blend of classroom-based, internet-based instruction.
- Sustainability
- Virtual resources (simulations, document archives, electronic texts)

**Montana Board of Public Education
Distance Learning Task Force**

Phase II Related Areas of Concern

Dual Enrollment

Finance Associated

Endorsement or Permissive Area of Special Competency for Teachers of distance, online, and technology learning

Facilitator training to include pedagogy and basic technology skills

Common definitions of terms related to distance, online, and technology delivered learning (e.g., "blended" delivery)

Montana Board of Public Education
Distance Learning Task Force

Appendix J

Presentations by
Distance Learning Vendors

December 15, 2006

Montana Board of Public Education
Distance Learning Task Force

Presentations by Distance Learning Vendors
December 15, 2006

Montana Schools eLearning Consortium (MSELC)
Sponsored by MTSBA/MREA
Helena, MT

Apex Learning, Inc.
315 5th Ave S, Ste. 600
Seattle, WA 98104

BYU Independent Study
206 Harman Continuing Ed Bldg
Provo, UT 84602

Fairfield Language Technologies (Rosetta Stone)
135 West Market Street
Harrisonburg, VA 22801

North Dakota Division of Independent Study
Box 5036
Fargo, ND 58105-5036

SVS HS Spanish
Kansas State University
128 Dole Hall
Manhattan, KS 66506

UNL Independent Study HS
900 North 22nd Street
PO Box 888400
Lincoln, NE 68588-8400

Pierson Digital Learning (NovaNet)
6710 E Camelback Road
Scottsdale, AZ 85251

USDLC
PO Box 249
Flowery Branch, GA 30542